Kickstart Your Wealth Management Marketing Strategy with Pardot Implementation

salesforce pardot

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An Overview

What can a wealth manager dream of then building better relations with clients? And what if a marketing automation solution can generate more leads, meaningful connections, empower sales, and close more deals?

Sounds great, right? Well, we are talking about Pardot that leads by a right Pardot consultant.

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Highlights

1. Manually performing email messages and campaigning

2. Identify the audience, create the right content

3. Automatically trigger desirable action based on schedules and customer behavior

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Challenges Wealth Managers Are Facing

- Transfer of Wealth
- Latest Technologies
- Lack of Financial Illiteracy
- Association

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01

Transfer of Wealth

According to CNBC, a giant amount of wealth whopping $64 trillion will change hands to the next generation in the next 25 years. This means the next generation is a new decision taker.

This change is one of the biggest challenges for wealth advisors, wherein the Salesforce Pardot is a perfect solution.

02

Latest Technologies

Technology-involvement & competitive apps like betterment are pressuring the marketing environment for non-digital ones. In such a way, adding powerful marketing automation like Pardot is the only solution that is heightening them.

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03

Lack of Financial Illiteracy

According to a financial quiz, only 18% of people under the age of 18-26 could answer 4 out of 5 questions. This estimates the financial illiteracy which demands a pinpoint, personalized and constant strategy that is only possible with Pardot consultation & implementation.

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Association

Consolidation of marketing & sales teams is the back-bone of wealth management marketing strategy. And for Pardot, Salesforce defines it as a line-bluer between marketing and sales.

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How Does Pardot Help With Wealth Management Marketing Strategy?

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Trust-Building Through Action

Trust might be the first step of any client and business relation. It leads by some reliable actions rather than taking. With Pardot, strong & calculative data is easy to trust that is possible with Salesforce Pardot. It connects customers and businesses throughout the sales funnel.

Highlighted Points

- Create a goal-based campaign
- Regular updates and check-ups
- Help to be available & accessible for clients
- In- advance alert clients about regular changes

Empower Wealth Managers

Yes, your wealth manager will be an expert in sales, adding advanced assets in their daily-day-life, empowers them to crack deals. The on-time & calculative approach of Pardot helps to deliver the right message to the right lead and boost marketing.

Apart from this, marketers can identify the high-risk moment such as when and how they are losing any potential lead.

Retention and Regain

Good communication can regain even gone leads. Continuous communication with email, chatbots, social media is the leading medium for lead retention. Unresponsive customers are also important to consider for re-engagement campaigns, and they can use Pardot well for targeting.

Personalization and Automation

Automate marketing strategies can breathe new life in wealth marketing. The below-mentioned point will make it clear how this marketing automation solution helping:

- Collect buyers data through the progressive profile, landing pages, and forms
- Use marketing tactics for personalized emails, content, and customer experiences
- cover automation features email trackings, prospect analytics, and sales conversion
- Tools help to start your personalized marketing strategies

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Conclusion

Wealth managers facing both side hurdles in the shape of competitive digital platforms and economic crises. In such ways, accessing them with the help of Salesforce Pardot can be an enormous relief. All you have to do is contact the expert Pardot consultant and you are all set to kick start your wealth management marketing strategy.

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